

# CM/ECF CIVIL CLAIM ATTORNEY TRAINING

## **Docketing a Claim**

1. Log in to CM/ECF. Locate the **CM/ECF Main Menu Bar** at the top of the screen. Click on the **Civil** option on the **CM/ECF Main Menu Bar** (see Figure 1).



**Figure 1 - CM/ECF Main Menu bar**

2. The system will display the **Civil Events** screen. Click on **Other Answers** in the Initial Pleadings and Service section (see Figure 2).

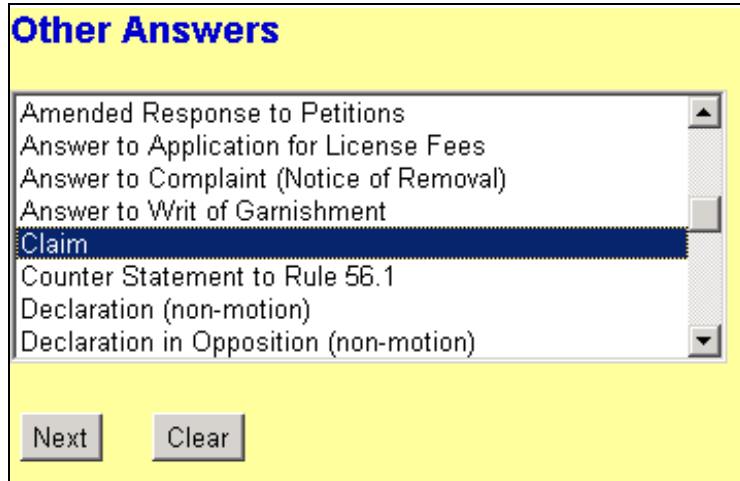


**Figure 2 - Civil Events screen**

# CM/ECF CIVIL CLAIM ATTORNEY TRAINING

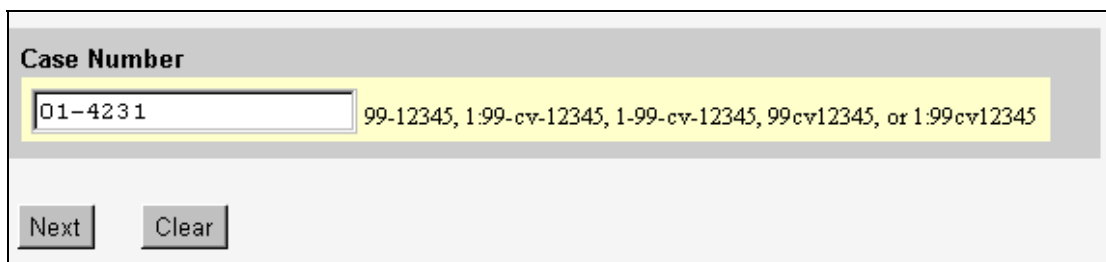
## **Docketing a Claim**

3. The system will display the **Other Answers** selection screen.
  - a. The system will display a list of various types of other answers. Click on the down-arrow or scroll down to select **Claim** from the list. Click on the word **Claim**. Once the **Claim** event appears highlighted, click the **[ Next ]** button to continue (see Figure 3).



**Figure 3 - Other Answers selection screen**

4. The system will display the **Case Number** screen. Enter the case number in the **Case Number** box, using one of the formats displayed. For example: **99-12345**, **1:99-cv-12345**, **1-99-cv-12345**, **99cv12345** or **1:99cv12345**. Click the **[ Next ]** button to continue (see Figure 4).



**Figure 4 - Case Number screen**

# CM/ECF CIVIL CLAIM ATTORNEY TRAINING

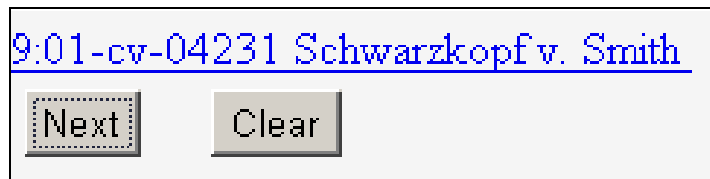
## **Docketing a Claim**

- a. If the case number entered is **not** a valid case number, the system will display the following message:

**1:yy-cv-nnnnn is not a valid case. Please enter a valid value.**

Click the [ **Back** ] button. The system will return you to the **Case Number** screen. Enter a valid case number, using one of the formats outlined in Step 4.

5. The system will display the **Case Number Verification** screen (see Figure 5). The purpose of the **Case Number Verification** screen is for you to verify the case number entered in Step 4.



**Figure 5 - Case Number Verification screen**

- a. If this is the correct case, click the [ **Next** ] button.
- b. If this is **not** the correct case, you **must** return to the **Case Number** screen in Step 4. To return to the **Case Number** screen, click the **Back** button of your browser until you reach the **Case Number** screen (see Figure 4 in Step 4). Once you reach the **Case Number** screen, repeat Steps 4 and 5.
6. The system will display the following message:

### **WARNING!**

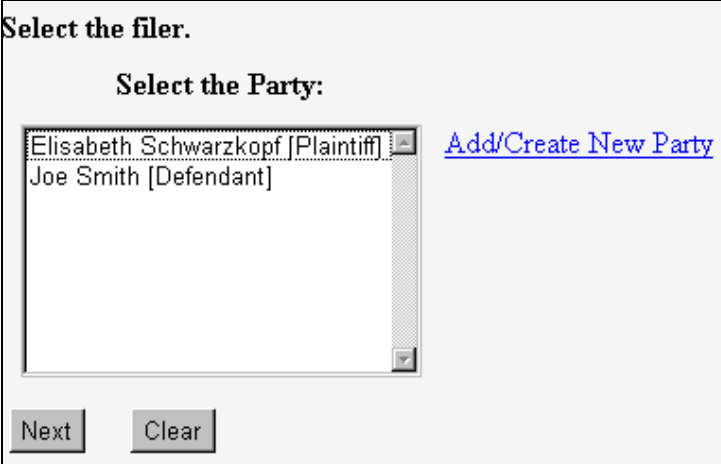
**Docket the *Rule 7.1 Disclosure Statement* before docketing this response.**

**Read this message carefully!** If the party filing the claim is a non-governmental corporate party and has **not** filed a Rule 7.1 Disclosure Statement, then a Rule 7.1 Disclosure Statement **must** be docketed before this claim is docketed.

# CM/ECF CIVIL CLAIM ATTORNEY TRAINING

## **Docketing a Claim**

- a. To docket the Rule 7.1. Disclosure Statement, abort this transaction by clicking the **Civil** option on **CM/ECF Main Menu Bar**. The system will display the **Civil Events** screen. Click on **Other Documents** in the Other Filing section of the **Civil Events** screen and docket the Rule 7.1 Disclosure Statement before docketing this claim.
  - b. If a rule 7.1 Disclosure Statement does **not** need to be docketed at this time, then click the **[Next]** button to continue.
7. The system will display the **Party Selection** screen (see Figure 7).



Select the filer.

Select the Party:

Elisabeth Schwarzkopf [Plaintiff]  
Joe Smith [Defendant]

[Add/Create New Party](#)

Next Clear

**Figure 7 - Party Selection screen**

- a. A list of the parties in the case will be displayed for you to select the party(ies) who is filing the claim. To select the party(ies) who is filing the claim, click on that party's name to highlight it, then click the **[Next]** button.

# CM/ECF CIVIL CLAIM ATTORNEY TRAINING

## **Docketing a Claim**

**NOTE:** If the party's name is **not** on the list, i.e., the claim is adding claimants to the case, click the [Add/Create New Party](#) hyperlink. Please refer to the **U.S.D.C. Southern District of New York's Standardized Procedures for Creating New Party Information in CM/ECF**. After you have added/created new party information return to the **Party Selection** screen. Select the party(ies) who are filing the claim, click on the party's name to highlight it, then click the **[Next]** button.

**NOTE:** If the claim is being filed by more than one party, click on the first party to highlight it, find the second party in the list, then hold down the Control <Ctrl> key on your keyboard while you click on the second party's name to highlight it. Repeat this process until all the parties who are filing the claim are selected.

8. The system will display the following message:

**WARNING!!!**

**Go Back, if necessary, and**

**ADD the claimant(s) with Claimant role on the select filer screen.**

**Read this message carefully!** This message is to remind you, if you haven't already done so in the previous steps, to add additional parties to the case with the claimant role, if the claim is adding parties to the case. If more parties need to be added to the case, click the **Back** button of your browser to return to the **Party Selection** screen, then click the [Add/Create New Party](#) hyperlink. Once you are certain all parties have been added and selected as needed, click the **[Next]** button to continue.

9. The system will display the **pdf document** screen. The **pdf document** screen is used to associate a PDF file/document with the docket entry being docketed (see Figure 9).

# CM/ECF CIVIL CLAIM ATTORNEY TRAINING

## Docketing a Claim

Select the **pdf** document (for example: CA199cv501-21.pdf).

**Filename**

**Browse...**

**Attachments to Document:** ☒ No ☐ Yes

**Next** **Clear**

Figure 9 - PDF Document Screen

- a. To associate a PDF Document with this docket entry, and if the PDF Document has any attachments, click the [ **Browse...** ] button and refer to the **Procedures For Uploading a PDF Document and Attaching an Attachment in CM/ECF**. After attaching the PDF Document, click the [ **Next** ] button to continue.
10. The system will display the **Type of Claim** screen. (see Figure 10).

Please enter the **TYPE** of **CLAIM** in **CAPS** ( eg. ADMIRALTY, PROPERTY, etc. ) in the box below.

If nothing is indicated, then leave blank.

**Type of Claim :**

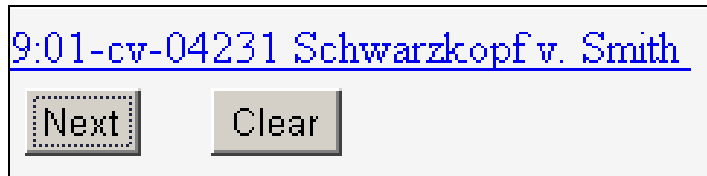
**Next** **Clear**

Figure 10 - Type of Claim screen

# CM/ECF CIVIL CLAIM ATTORNEY TRAINING

## **Docketing a Claim**

- a. If this is a specific type of claim, then enter the type of claim in the box next to the **Type of Claim:** prompt. Examples of claim types that might be entered in this box include **ADMIRALTY**, **PROPERTY**, etc. Click the **[ Next ]** button to continue.
  - b. If this is **not** a specific type of claim, then leave the box next to the **Type of Claim:** prompt blank. Click the **[ Next ]** button to continue.
11. The system will display the **Case Number Verification** screen again (see Figure 11). The purpose of the **Case Number Verification** screen is for you to verify the case number entered in Step 4.



9:01-cv-04231 Schwarzkopf v. Smith

Next Clear

**Figure 11 - Case verification screen**

- a. If this is the correct case, click the **[Next]** button.
  - b. If this is **not** the correct case, you **must** return to the **Case Number** screen in Step 4. To return to the **Case Number** screen, click the **Back** button of your browser until you reach the **Case Number** screen (see Figure 4 in Step 4). Once you reach the **Case Number** screen, repeat Steps 4 through 11.
11. The system will display the **Docket Text: Final Text** screen. The docket text will be displayed. The system will display the following message:

# CM/ECF CIVIL CLAIM ATTORNEY TRAINING

## **Docketing a Claim**

**Attention!!** Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.

**NOTE: CHECK THE DOCKET TEXT CAREFULLY HERE. THIS IS THE LAST CHANCE FOR YOU TO GO BACK AND CORRECT ANY ERRORS IN THE TRANSACTION OR TO LEAVE THE TRANSACTION AND START OVER BY CLICKING THE CIVIL OPTION ON THE CM/ECF MAIN MENU BAR.**

When you click the [ **Next** ] button on this screen, you are submitting this transaction to the CM/ECF database. If there is a mistake in the transaction, you will **not** be able to click the **Back** button of your browser to make any corrections.

If you are completely satisfied with the transaction, click the [ **Next** ] button to complete the docketing of this transaction.

12. The system will display the **Notice of Electronic Filing** screen (see Figure 12). The **Notice of Electronic Filing** screen is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document.
  - a. To print a copy of this notice, click the browser **Print** icon.
  - b. To save a copy of this receipt, click the **File** option on the browser menu.

**NOTE:** When you arrive at the **Notice of Electronic Filing** screen, you are finished with the filing/docketing of your transaction. You can select a choice from the **CM/ECF Main Menu Bar** at the top of the screen. For example, you can click on **Civil** or **Criminal** to file/docket another transaction.



**CM/ECF**  
**CIVIL CLAIM**  
**ATTORNEY TRAINING**

Notice of Electronic Filing

The following transaction was received from Leslie LeFord on 10/29/2001 at 2:42 PM CST

**Case Name:** Schwarzkopf v. Smith

**Case Number:** [0-01-04231-RB](#)

**Document Number:** [19](#)

**Docket Text:**

MOTION to Continue by Joe Smith. (Ledford, Kerry)

The following document(s) are associated with this transaction:

**Document description:** Main Document

**Original filename:** R:/TRAINING/ECF/Docs\_PDF/ECFdocs/Motion.PDF

**Electronic document Stamp:**

[STAMP dcstdStamp\_ID=981407491 [Date=10/29/2001] [FileNumber=50855-0]  
[3f9f4f49836ae59be00306477b777c2dbc6dc6f8b64b9530ad63962089ccd394dc735  
12a16b3c4e11ef754e17e46a53ccdc5d5eb14d5f549179dbc3da4ad03a7]]

**0-01-04231-RB Notice will be electronically mailed to:**

**0-01-04231-RB Notice will not be electronically mailed to:**

Dale P. Jones  
Jones and Associates  
129 Main Street  
San Antonio, TX 78209

Leslie LeFord  
Courthouse Steps  
271 Main Plaza  
San Antonio, TX 78201

**Figure 12 - Notice of Electronic Filing screen**